

## INVITED EDITORIAL

# P.A.L.T.: An Interdisciplinary Model for Organizational Diagnosis and Intervention

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Doi: 10.19044/esj.2017.v13n31p1 [URL:http://dx.doi.org/10.19044/esj.2017.v13n31p1](http://dx.doi.org/10.19044/esj.2017.v13n31p1)

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### **Abstract**

The present work is an analysis with comments of the model created by Dr. Roberto Kertész.

The organization is a complex social reality that is defined as a set of people, a deliberate internal structure and a common goal. This is achieved through processes of transformation of certain "inputs" to the system - organization, obtained from the context or environment.

The P.A.L.T is a systemic model, in which the organization has the opportunity to regulate its activity.

The levels of the efficiency of the organizational performance will obviously depend on the quality of these interactions and the study of the nature of them will allow the management to achieve a set of more valuable results.

In order to systematize this set of knowledge, it is convenient to group its components in a model that is both analytical and integral.

The PALT model stands for this objective, which means the systemic integration of the Psychological, Administrative, Legal and Technical variables.

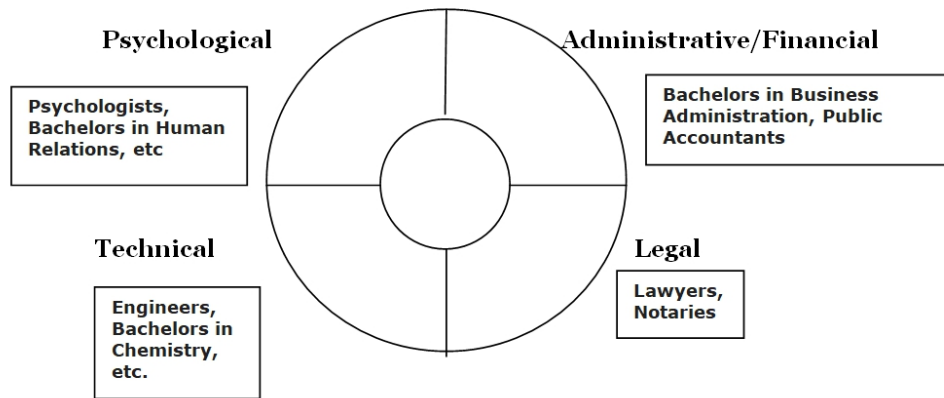
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**Keywords:** Companies, management, interdisciplinarity

### **Definition and Description of the Model**

We have conceived the P.A.L.T as a systemic and interdisciplinary model, composed of 4 key variables present in any organization:

**Which professionals specialize in each variable and what do they need to know about the others?  
(sharing a common and understandable language for the customer)**



**P: The Psychosocial Variable**


Psychology has to do with understanding the personality and world model of organization members as individuals: their values, beliefs, motivations, decision making styles, problem solving, management of conflicts, and leadership. In addition to the individual aspects, it includes Psychosocial Psychology, relationships between people performing in the organization, both formal and informal. The formal aspect includes the interactions originated in the vertical (hierarchical) structure of the organization with situations related to the management of power, delegation, motivation and leadership, direct supervision, team building, etc.

Regarding the horizontal (functional, informal) structure of the organization, it covers a lot of interactions, mainly coordination, optimization of scarce resources, intraorganizational competitiveness, interdisciplinary work, training, company / family delimitation, possible continuity plans or succession, etc.

Besides, the informal context, coexisting with the formal, covers the interactions and communications as rumor, affinities and antagonisms, social recognition, responses to the expression of various emotions, styles of leadership, formation of groups and their intra-and inter-group relations, labor climate, cooperation versus competition, motivation for belonging, etc.

In family businesses, due to the structural coexistence of two different social systems (business and family), the informal issues typically implicate much higher intensity.

**The Two Social Systems: Family and Business**

Family		Business
<ul style="list-style-type: none"> <li>*Mutual protection</li> <li>*Confidence</li> <li>*Cooperation</li> <li>*Loyalty to relatives</li> <li>*Surname pride</li> <li>*Search for stability</li> <li>*Permanence</li> </ul>		<ul style="list-style-type: none"> <li>*Productivity</li> <li>*Profitability</li> <li>*Business growth with reinvestment of earnings</li> <li>*Competition</li> <li>* Risk assumption in the face of opportunities</li> </ul>

Professionals who are mostly related to this aspect are business or organizational psychologists, graduates in labor or human relations, and specially trained psychiatrists. However, any other professional can contribute to the firm, even if he/she lacks the specific academic training...all have something to say or recommend!

Beside this, we essentially consider that the "natural" family firm advisors (public accountants) possess some training in behavioral sciences. This is because very few small and medium sized businesses hire specialists on these issues.

Today, the offering of coaching courses for any profession is spreading increasingly. In view of this need, the University of Flores has created a Diploma in Transactional Coaching, which includes a series of questionnaires for the diagnosis and counseling and training for facilitation and self-knowledge (Kertész, 2008).

**A: The Administrative / Financial Variable (or Administrative Functions)**

It refers to the knowledge needed to carry out management activities:

A) Financial management, ensuring the cash flow necessary at all times to cover the various factors of production, paying taxes, the decision of the investments to be made and relationships with sources of credit, such as banks;

B) Accounting, which should adequately record economic changes of the entity and the generation of results, becoming the quintessential information system of the organization, both for internal use and for external use;

C) Marketing, which should ensure an adequate offer of goods and services and the correct distribution and optimal reception of products or services by society;

D) Planning and budgeting in particular, whose mission is to reduce levels of uncertainty and eliminate overlaps, gaps, and wasteful activities;

E) The administration of human resources, including recruitment policies, training, promotion and pay; and

F) The control mechanisms of management, strategic and operational, which should ensure that what has been undertaken by the organization effectively corresponds to the provisions above.

This variable, however, corresponds traditionally to the public accountants, managers, industrial engineers, bank officers, etc.

### **L: The Legal Variable**

It covers the application of the science of law, including labor, which refers to the relationship between owners and employees; the commercial law, which complements the marketing; the civil and corporate law, which establishes rules related to property, contracts, the rights of individuals and institutions, etc.; public law, based on the relationships between individuals and the state and among the various segments of this and, last but not least; international law, which is increasingly important as a process of globalization in absolute validity.

The most important issues to consider are:

A) The choice of the most convenient type of society and decisions about its members and their conditions of functioning;

B) The economic and equity aspects;

C) Agreements, mergers, inheritance, divorces;

D) Links with unions, labor laws and lawsuits;

E) Registration of patents and trademarks.

Obviously, these issues are located within the competencies of lawyers and notaries, but they frequently collaborate with the public accountant of the firm.

### **d) T: The Technical Variable**

It covers the organization and technology, machinery, and the inputs used to generate the products and services that the organization includes in its mission. Also, it should offer to the market what it serves:

A) Raw materials and inputs in general, relationships with suppliers;

B) Installations and maintenance;

C) Methods of packaging, storage and transportation of products;

D) Research and development that will maintain current bid in a changing world;

E) Quality control and reengineering methods;

f) Distribution, logistics, import and export.

Those responsible for these aspects are the professional who are related to the specific products and services of the organization (engineers, chemists, graduates in computer science, etc.) or simply those who know how to generate them.

### **The Systemic and Interdisciplinary Model**

While its four variables, P, A, L and T are distinct, they are integrated into the reality of the same object of study: the organization. Prior to its daily work, there are inevitable interactions and reciprocal influences between these variables.

Thus, the PALT model explains how the same realities are analyzed from different BUT absolutely complementary approaches, covering fully the body of knowledge that the organization requires.

In practice, however, it is common to fall into the known drawback of "each teacher with its booklet". Here, each professional tends to interpret the problems from their specific point of view, although the client / entrepreneur need to solve them in an interdisciplinary way ... because reality is made this way.

In addition, it is necessary that all consultants speak the same language, understandable to others and specially for the customer, rather than being expressed in the jargon of their discipline.

Also, you can reiterate that the consultant by excellence of companies, present in all requirements of taxes, renditions tax and balance, is the public accountant. Thus, he should serve as a "family doctor", generalist, covering roughly all variables of the business and should be able to summon and consult the different specialists.

These experts, if we follow the model of medicine, would be the "medical specialists" that are required in each case (lawyers, bankers, psychologists, insurance agents, technicians, etc.).

In practice, unfortunately, the role of the accountant is usually much more limited. It is restricted to the financial aspects and in particular taxes, receiving low fees, and has limited availability of time for their many customers.

This is both due to a traditional academic background, and the usual resistance of employers to be advised. Thus, it tends to create a vicious cycle that limits the hiring of temporary advisers that could contribute to the professionalization of the organization.

### **The New Behavioral Sciences**

These recent disciplines emerged in the second decade of the twentieth century, feeding on various disciplinary roots of modern philosophy of postwar systems theory, cybernetics, neurophysiology that

shows much more about the workings of the brain, the stress phenomenon in its negative and positive manifestations, behavioral laboratory research, etc.

It also involves the humanistic movement with great masters such as Victor Frankl, Jacob Moreno, Hans Selye, Fritz Perls, Carl Rogers, Milton Ericsson, among others, and specially Eric Berne, founder of Transactional Analysis (TA). The Transactional Analysis (TA) is possibly the best resources to understand our behavior and that of others and to generate options for positive change.

The fact remains that in over 40 years of experience in the diagnosis and counseling of psychosocial variables, specially in family businesses, Transactional Analysis is the best single tool currently available for the clarity of its language, its objectivity, the ability to visually lay out its instruments, its philosophy of confidence in the dignity and potential of the human being, and its good humor.

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